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I. Beginning of the Month

A. Who Do I Need to Bill For?

On the first of every month, OS does 2 things:

- Remove all of the *s currently attached to any student
- Send a listing of all SE students in our county to the state. The state then sends the listing back indicating which students qualify for Medicaid for that month.

As soon as we receive the information from the state, we place a * next to all students that (per the state) qualify for Medicaid. Thus, any star you see listed during a month is only an indication of that student’s eligibility for that given month. It does not have any bearing on past or future months. Student’s eligibility can change from month to month.

Once we have updated the information into MISTAR, we will send an email to all staff members letting them know along with our monthly Medicaid Matters newsletter. Let you SE office know if you suspect that you are not on our distribution list.

There are two options for you to use in determining who you will need to submit an entry for each month. Once you determine who the students are, continue to “What Procedure Code?” on page 4. If there are no students you need to submit an entry for, please go to “Quality Review” on page 8:

Option One

Run the “OS Provider - Medicaid Eligible without Services Report” for the month.

This will give you a listing of students that you will need to bill for during this month. If the report comes back and says “report canceled” then you have no students currently listed to submit an entry for this month.

Option Two

Pull up your caseload on service tracker and for each student listed, answer the following question:

1. Does this student have a * in MISTAR? □ No □ Yes

If you answered YES, then you need to submit at least one entry this month for that student.
B. What Procedure Code?

For each student you need to submit an entry for this month, answer the following 3 questions:

1. Is this student on your caseload? □ No □ Yes
   (Contact your SE Office to let them know the student is not on your caseload)

2. Do we have parental consent to bill Medicaid? □ No □ Yes
   (Run the parental consent report if you do not know)

3. Does this student receive direct health related services with a set frequency and duration? □ No □ Yes

If you answered NO to any of the 3 above questions, then you will use the NOSRVC procedure code proceed to the “NO BILLABLE SERVICES GUIDE” on page 5

If ALL of your answers were YES, then you will use a billable procedure code proceed to the “BILLABLE SERVICES GUIDE” on page 6
II. No Billable Services Guide

This can be done at any time during the month

1. Go into Service Tracker
2. Click on the students ID
3. If this is your first billing for this student, for the school year, the screen will say “no services available for the xx-xx school year”. Just ignore this statement. It means that you have not submitted any billings so far this school year for this student.
4. Click on New Service
5. Input Screen will come up
6. Go to Service Detail (middle section)
   a. Service Date – put in any date from the month you are billing for
   b. Click somewhere in the white area
   c. Procedure Code – NOSRVC
   d. Presenting Problem – other health
   e. Notes – just put “see summary”
   f. Click on Save – this will update the screen, your service date and information will disappear and you will be able to go to the summary detail section.
7. Go to Summary Detail (bottom section)
   a. Monthly Progress Date should be the month you are billing for
   b. Monthly Progress Notes: record here why there is “No billable Services”: for example:
      i. Student is consult only
      ii. No parental consent
      iii. Student was absent
      iv. Student not on my caseload
      v. Did not see student this month
   c. Click on Save
   d. Click on Ready to Bill - a response box will pop up letting you know that this will put all this months service dates into ready to bill, just click OK
8. After quality review is completed by OS, the status will change from “Ready to Bill” to “Closed”

Please proceed to “Quality Review” on page 8
III. Billable Services Guide

A. Entering Individual Billing:

1. Go into Service Tracker
2. Click on the students ID
3. If this is your first billing for this student, for the school year, the screen will say “no services available for the xx-xx school year”. Just ignore this statement. It means that you have not submitted any billings so far this school year for this student
4. If services have been entered prior to this session a listing will show up
5. Click on New Service (see step 8) or click on a past service date if you want to use the Save & Copy Feature (see step 8)
6. Input Screen will come up
7. If you clicked on New Service -- Go to Service Detail (Middle section)
   a. Service Date – using the calendar icon put the date that you saw the student
   b. Click somewhere in the white area
   c. Select a Procedure Code - see Tip Sheet for listing of codes and descriptions
   d. Select a Presenting Problem
   e. Select Treatment Response
   f. Enter Start and End Times, if required
   g. Notes – (see Tip Sheets for service detail note examples)
      i. Reference each type of service claimed including crisis intervention, assessments and participation in the multi-disciplinary team assessment
      ii. Describe the type of service/treatment
      iii. Indicate the student’s response to service/treatment
      iv. The note must be sufficiently detailed to allow for reconstruction of what transpired
   h. Click on Save or Save & Copy
      i. Save will save your information and bring back up a blank input screen
      ii. Save & Copy will save your information and then the screen will refresh but will keep all the information except for the service date.
8. If you clicked on a past service date – the information from that past date will come up
   a. Click on Save & Copy
   b. Screen will refresh and all the information will remain except for the service date
   c. Using the calendar icon, put the new date in
   d. Verify that the Procedure Code, Presenting Problem, Treatment Response, and Times are correct
   e. Notes –
      i. Reference each type of service claimed including crisis intervention, assessments and participation in the multi-disciplinary team assessment
      ii. Describe the type of service/treatment you provided to the student that day
      iii. Indicate the student’s response to service/treatment
      iv. The note must be sufficiently detailed to allow for reconstruction of what transpired
   f. Click on Save or Save & Copy
      i. Save will save your information and bring up a blank input screen
      ii. Save & Copy will save the information, then the screen will refresh, duplicating all the information except for the service date.
B. **Entering Group Billing:**

If you have a Group Session in which several eligible students are present; there is a feature that allows you to enter the *service detail information* at one time for all of them:

1. Go into Service Tracker
2. Select students by clicking in the box to the left of their Student ID
3. Click View Group
4. Click Group Services Button
5. Click on **New Service**
6. Input Screen will come up
7. Go to Service Detail (Middle section)  
   a. Service Date – using the calendar icon put the date that you saw the student  
   b. Click somewhere in the white area  
   c. Select a Procedure Code  
   d. Select a Presenting Problem  
   e. Select Treatment Response  
   f. Enter Start and End Times, if required  
   g. Notes – (see Tip Sheets for service detail note examples)  
      i. Reference each type of service claimed including crisis intervention, assessments and participation in the multi-disciplinary team assessment  
      ii. Describe the type of service/treatment  
      iii. The note must be sufficiently detailed to allow for reconstruction of what transpired  
   h. Click on Save or Save & Copy  
      i. Save will save your information and bring up a blank input screen  
      ii. Save & Copy will save the information entered and then the screen will refresh, duplicating all the information except for the service date.

If you use this group feature, the student’s response to service and notes will be the same for all of the students you have grouped together. Therefore, do not include specific student names in your service detail note as these will be tied to all of the students in your group billing. You can indicate the student’s response to treatment in your monthly summary note.
C. Completing the Billing:

To place your billings into the “ready to bill” status at the end of the month:

1. Go into Service Tracker
2. Look at each eligible student
   a. Did you enter any service dates for this student?
   b. If no, then you would proceed to the “No Billable Service Guide” (go to page 3)
   c. If yes, continue on -
4. Click on the students ID
5. Click on Monthly History
6. Select the month you are billing for
7. Enter the monthly progress note – (see Tip Sheets for monthly progress note examples)
   a. Summarize (evaluate) the student’s monthly progress toward their goals
   b. Specify what the student’s health goals are as listed in their IEP (be careful not to list academic goals)
8. Click on Save
9. Click on Ready to Bill - a response box will pop up letting you know that this will put all this months service dates into ready to bill, just click OK (see special instructions below if you are a limited license provider under the supervision of a fully licensed therapist)

Special Billing Instructions if you are a limited licensed provider and are under the supervision of a fully licensed therapist:

1. Click on Ready to Bill - a response box will pop up letting you know that this will put all this months service dates into ready to bill, just click OK
2. A box will pop up asking you to enter your supervisor’s signature and date
3. A new drop down box will pop up on the bottom left asking for the name of the supervisor who is supervising you.
4. Either choose “other” and enter the name yourself, or choose “staff” and then scroll through the names to find your supervisor (names are listed alphabetically by building)
5. On the bottom right hand side, enter today’s date for the supervision date
6. Click on Ready to Bill - response box will pop up letting you know that this will put all this months service dates into ready to bill, just click OK
7. Once all billings are in the “ready to bill” mode, print out a copy of your service and summary notes for the month.
8. Send notes to your supervisor for their signature
9. All signed notes need to be kept with your district for the current fiscal year plus 7 years in case of audit.
IV. Quality Review

1. Staff Responsibilities:

All billings need to be in “Ready to Bill” by the 5th business day of the following month. Once you have submitted all of your billings for the month do the following:

1. Repeat the option listed on page 1 that you used to make sure you have billed for every student you needed to.

   For **Option One**, The report should come back as “report cancelled”. If any students show up on the list, then you need to go back and do an entry for that student.

   For **Option Two**, remember, the *’s listed next to students are for the current month. So if you are billing for the previous month, then you need to run the “OS Provider Eligibility Report” to see who had the *’s during any previous month. Again, for any student that was eligible, follow the “Option Two” on page 1 to determine if you needed to submit an entry for that student.

2. Run the “Service and Summary” report to check for billings in the “open” status from the beginning of the school year to the end of the month you are billing for. The report should come back as “report cancelled”. If any billings show up then you need to move them from the open status to the ready to bill mode.

2. OS Process:

On the 6th business day of every month, Oakland Schools will run a Quality Review where they will “scoop” up all the “Ready to Bills” and review them. The status of each “ready to bill” billing will then change to one of the following:

   “Closed” - 😞 - The billing was completed correctly but will not go onto the state.

   “Billed” - 😊 - The billing was completed correctly and will now move onto the state.

   “Failed-Resubmitted” – 😐 This means there was an error in the data that you entered and another “OPEN” will be generated for that billing date. (The “failed-resubmitted” billing will continue to remain on the Service History screen even after you have corrected the “open” billing)

If your Billing goes to “Failed-Resubmitted” OS will send information regarding the billing to your SE Secretary who should then forward the information on to you so you can go back into the “Open” billing, correct the information and place the billing back into the “Ready to Bill” status.
3. **Open and Missing Reports:**

After OS has finished the quality review for all of the districts, an open and missing report for each district will be generated and sent to your SE Office.

**“Open” billings** – there are 2 reasons why your billing would be in the “open” (“O”) position.

1. You forgot to finish the billing and place it in the “ready to bill” status.
2. The billing failed the quality review and a new “open” billing was generated for you to correct and resubmit. Your SE Office would have received a letter from OS for you regarding why the billing failed and how to correct the billing.

**“Missing” billings** – these are students that were linked to your caseload during that month, who were Medicaid eligible and receive direct health services but no data was entered for the student, as indicated with a “1” on the report.
V. Miscellaneous Instructions:

Special Instruction if you are not able to go from the Service Detail (middle section) to the Summary Detail (monthly section)

1. Click on the students ID
2. Click on Monthly History
3. Select the month/year you are billing for
4. Enter the monthly progress note
5. Click on Save
6. Click on Ready to Bill - a response box will pop up letting you know that this will put all this months service dates into ready to bill, just click OK

Special Instruction if you need to bill for a student that is not on your caseload

1. Go into Service Tracker
2. Click on Find Student
3. Enter Name
4. Click on Student ID
5. Click Select
6. Student will come up with all billings for the school year (if no billings have been submitted yet for this student, the screen will say “no services available for the xx-xx school year” – just ignore this)
7. Click new service
8. Proceed as normal
9. Student will now show up on your caseload until OS completes their next quality review